

Iowa CASA Coach Pre-Service Training

Participant Manual

Iowa Child Advocacy Board

Module 2

Coaching Advocates for Effective Advocacy

In-person Training





Welcome to Module 2 of CASA Coach Pre-Service Training

Thank you for completing Module 1: Coaching Advocates for CASA Program Success. That independent study was created to provide you an introductory understanding of the Coach role and an overview of some key concepts we will continue to explore in this module.

This training session is intended to provide additional information about the three pillars of coaching that support ICAB's mission, along with opportunities to practice some of the coaching duties that you will perform. Following your pre-service training for becoming a CASA Coach, you will have additional first year Coach in-service trainings, as outlined in Module 1, that will provide further information and skill building to refine your Coach role.



In order to know more about each participant, let's begin with introductions! Please share with the training group your name, length of service with the CASA program and one thing that interests you about becoming a CASA Coach.

Activity: Coaching Fears

It's natural that most people have concerns and fears about starting something new. Becoming a CASA Coach is no exception.

On 3 post-it notes, please write one concern or fear you are feeling about becoming a CASA Coach. Please hand these to your facilitator. Near the end of the training, we will revisit those concerns and see if we've addressed your thoughts.

Introduction

The CASA Program staff are incredibly grateful that you've decided to pursue CASA Coaching. Our goal is to achieve the following **learning outcomes** from participation in this training module:

- Articulate to your Advocates the goals and expected outcomes of utilizing the CASA Coaching model for program management.
- Implement with your assigned Advocates the differentiation of the roles and duties of the CASA Advocate, Coach, and Coordinator.
- Utilize increased knowledge of CASA Coach competencies and self-assess continued learning needs in these areas.
- Apply acquired knowledge of key Coach duties, expectations and skills with your Advocates.

**Reviewing the Rationale of the Coaching Model**

Module 1 outlined that the CASA Coaching model for program management is a means to expand CASA Advocacy efforts to more children in Iowa. By calling upon our amazing seasoned Advocates to become Coaches, our Local Coordinators can invest more of their time in additional recruiting, training, and supervision of our network of volunteers.

The coaching efforts are a critical method of support for our local programs that without, we could not provide the necessary attention to meeting our goal of increased numbers of assigned Advocates. Ultimately, the time and efforts of our staff, our Coaches and our Advocates, translates into more support for the children in our communities who benefit from the CASA program's advocacy efforts. Reminding ourselves that our mission, to ensure each child is living in a safe, permanent, and nurturing home, is the ultimate goal and reason for the CASA Coaching role.



Module 2 Coach Pre-Service Training will continue to expand upon the content shared in Module 1 on the specific tasks and responsibilities those in the Coach role perform. This translates into *Supporting the Program, Supporting the Advocate, and Supporting the Child.*

Coach Role: Duties and Expectations Review

Let's review what was shared in Module 1 about this specialized CASA Role.

Purpose:

The CASA Coach provides coaching and support to the CASA Advocates to ensure that children with an assigned Advocate receive sound advocacy and timely permanency planning.

Time Commitment:

Approximately 15-20 hours a month for a two-year period.

Requirements:

- Meet all screening and training requirements as outlined in current policy.
- Successfully complete Coach Pre-Service Training curriculum.
- Participate in all First Year Required Advocate trainings. This requirement can be met by completion within duties as an assigned CASA Advocate or as a Coach with a newly assigned Advocate.
- Complete 12 hours of continuous learning sessions annually.

- Be knowledgeable about the CASA Policy and Procedure Manual and its annual updates to support assigned Advocates.
- Demonstrate confidentiality at all times.
- Commit to 2-year length of service.
- Available 15 to 20 hours monthly.
- Support and coach 3 to 5 Advocates in their advocacy efforts with children.
- Maintain/uphold the Coach core competencies.
- Computer Skills - knowledge of internet software including email, CAMS, EDMS, and word processing.

Duties of Coach Position:

- Maintain confidentiality at all times.
- Communicate with Program Coordinator to schedule time to assist with case assignment for your assigned Advocates.
- Accept case in CAMS to access case file information.
- Be present at case assignment meeting with Program Coordinator and Advocate. May be a participant in the case assignment and case planning process or as an experienced Coach, may lead the case assignment and case planning meeting.
 - Receive initial discovery documents from Coordinator and/or EDMS; review with Advocates, making note of important documents.
 - Complete an Advocate Case Action Plan with Advocates at case assignment.
- Contact newly assigned Advocates within 48 hours of case assignment to support coaching relationship and outline role expectations.
- Maintain minimum bi-weekly (every other week) contact with Advocates who have a case assignment to obtain case updates and address any issues.
 - Remind Advocates of their role and responsibilities including CAMS entries, training hours, assessments, court hearings and report deadlines.
- Utilize CASA Training materials to support Advocate's case efforts and program expectations.
- Provide networking opportunities for team of Advocates.

- Check email (every other day) to timely respond to Advocates and their case needs.
- Check CAMS (every other day) to timely review case notes and monthly updates.
- Check EDMS account regularly for court-related case updates.
- Document your own coach-related activities within CAMS.
- Be available to attend court hearings, FCRB meetings, FTDM meetings, and DHS staffings with Advocates, or on their behalf, and document actions taken in CAMS.
- Review and edit Advocate's draft court reports, approve completed court reports and notify Program Coordinator for report finalization, filing, and distribution.
- Provide Advocates with supportive case oversight via understanding case issues and sharing available community resources.
- Communicate a minimum of once per month with Program Coordinator to discuss Advocates supervised, case developments and other issues or concerns that have arisen.
- Consult with Program Coordinator regarding assigned Advocates' performance concerns and provide input for annual mutual performance review.
- Schedule coverage for your unavailability. Timely contact Program Coordinator regarding coverage issues.
- If assigned to own active case as an Advocate, continue ongoing case advocacy efforts and case responsibilities.

We will cover these duties and provide opportunities to practice and strengthen your competencies during this module related to the tasks you will complete as a Coach.



Are you ready to become a CASA Coach?**Activity/Discussion: Coaching Readiness Self-Assessment**

Please take out the Coaching Readiness Self-Assessment you completed in Module 1. Listen as the facilitator talks about each score category.

1. How do you feel about your score?
2. Did you score in a range where you may have anticipated?
3. What types of support or training at this moment does your assessment indicate you need to feel more prepared for coaching?

There are no right or wrong answers or scores. The Iowa CASA program is ready to support CASA Coaches with all skill levels. Overall, we hope you gain enough confidence to begin coaching Advocates after this training. Depending on your comfort level, you will not be assigned five Advocates immediately. Instead you will be assigned Advocates as you're ready to take them on.



Pillar of Supporting the Program

Across the national network of CASA programs, it has been determined that there are critical tasks that an Advocate's Coach should complete to assist local programs in effectively accomplishing the myriad of duties that are necessary to administer a local program.

Of those tasks, two important functions of Iowa Coaches within the Pillar of *Supporting the Program* are assigning a new case to an Advocate and editing the CASA Advocate's Court Report. Each of these functions are done in conjunction with a Local Coordinator who ultimately holds the responsibility for completion. In this section, we will provide details on what the Coach role encompasses within each of these duties and an opportunity to practice the skills necessary to be successful.



Additional tasks that Coaches participate in when they are supporting the program include monitoring the Advocate's efforts within the CAMS system, maintaining bi-weekly (every other week) contact with each of their assigned Advocates, communicating with ICAB staff regarding programming policies and lending a hand to Local Coordinators by supporting and recognizing the Advocate's time and efforts, which helps our program retain our volunteers.

Experienced Coaches have shared that the benefits of their role in *Supporting the Program* include gaining insight into the nuances of effective advocacy as a CASA, gaining a sense of purpose in helping the program expand its reach of serving additional children, and remaining connected to the program's mission in a different capacity than being an assigned Advocate. Some have said that the skills and attributes they personally brought to this coaching role, such as being planful and organized or having strong initiative, have expanded by having these increased responsibilities.



Coaching During Case Assignment

The first critical function our Coaches provide that supports our program is assigning a new case to an Advocate. This might be a seasoned Advocate, or a newly trained Advocate who has recently been sworn in by the Judge presiding over Juvenile Court. Without this assistance our Local Coordinators would have less time to recruit and train new Advocates in order to serve more children and have less time to provide support to our Coaches.

Coordinators will place newly sworn-in Advocates on a Coach's team with their knowledge and participation. Your Coordinator will provide you some basic demographical information about the Advocate such as their phone number and email address. They can also share any known information that may influence the coaching relationship or case assignment, such as if this Advocate works full-time or prefers cases with teenagers. In addition, they can share observations about the Advocate during the pre-service training and their thoughts on the level of support the Advocate will need from you as their Coach.

Prior to your first in-person meeting, it is best practice that you have reached out to your Advocate. This may be a phone call to introduce yourself, or if time is short, an email with what the Advocate can expect for the next time

they will hear from you. If the scheduled in-person meeting is a general ‘get-to know each other’ event and will not include actually assigning the case to the Advocate, you will want to remind the Advocate to bring along their computer or tablet with them to their next meeting when the case is assigned.

Your Local Coordinator will be present during your *first* time assigning a case. It may be local practice that the Coordinator is part of every case assignment meeting. However, some Coordinators find that due to schedule coordination with seasoned Coaches, it is no longer necessary for all three individuals to be present.

Coaches will *always* be present at the case assignment. This is important for a number of reasons; one of which includes that the success of the coaching model in the CASA Program is founded on the relationship our Coaches build with their Advocates. Case assignment is also an important function for the Coach to build their own case knowledge so they can support the Advocate’s efforts appropriately.

Coordinators build their relationship with Advocates and Coaches through the 12 annual hours of training that all our volunteers are required to participate in to meet National CASA Standards. In addition, Coordinators may arrange for networking opportunities for Advocates and Coaches where they can also maintain their connections. For example, in some areas of the state, these are called CASA to CASA events.

Coaches address a number of items with Advocates when they assign a case. We provide a **Coach’s Quick Guide** as a resource which includes details on case assignment and beyond. Found at the back of this module, this will provide you with a checklist of key talking points, items required to be completed by the Coach, and necessary forms to be completed during that meeting. The case assignment section of the **Coach’s Quick Guide** is meant to be expansive in nature to help guide your efforts as a Coach. We recognize that your first case assignment will be an ‘on the job training’ experience that will become more familiar and less overwhelming over time.

Our Coaches are instrumental in the success of our program by taking on an increased responsibility for ensuring that our Advocates are supported

adequately during their case assignment. We rely on our assigned Coaches to be the “eyes and ears” for the Local Coordinator and program to ensure that the program goals and Advocate responsibilities are being met, not only minimally, but to the impressive extent that those other interested parties around us have come to expect from the CASA Program and our trained volunteers.

If anytime, within the scope of your role as a Coach, you feel that you have not been adequately trained or supported to meet the coaching expectations, or are no longer able to meet your unique role responsibilities, we sincerely want to know that, and work together to make your coaching role a meaningful volunteer experience.

Activity: Assigning a Case

Part 1: Complete your assigned section of Handout 1: Assigning a Case. Include your ideas for the key points you believe need to be made about your assigned topic with a newly assigned Advocate.

Remember that this is a learning mechanism and you are not expected to have all the answers.

Part 2: Share your ideas. Listen as your facilitator covers important areas of discussion between the Coach and the Advocate.



A Coach's Guide to Editing a CASA Report

The second major function of a Coach as part of *Supporting the Program* pillar is editing the Advocate's report. This includes editing for quality advocacy and effective recommendations. Having solid writing skills and a keen eye for details to edit the Advocate's report are important skills for a Coach.

As you know, the CASA report is one of many reports that a judge will read prior to each court hearing. It is the testimony of the program's advocacy efforts and the culmination of the assigned Advocate's efforts. This report provides a voice to the child and outlines objective recommendations that can elevate the long-term outcomes for the child. Because of those truths, our Coaches make an immense contribution to the program by thoroughly completing the report review and editing process.

Some key areas stressed in the **Coach's Quick Guide** for this task include:

- ❖ Ensuring the report is child centered. Each section should list and narrate information about the child first.
- ❖ All statements are to be objective and fact based. Descriptor words such as adjectives and adverbs at times can suggest a conclusion that others who observed the same facts may not describe similarly.
- ❖ The body of the report should always reflect information gathered in the first person, by the Advocate.

- ❖ Information shared by other interested parties will offer additional information for the Judge but should not be the sole source of information included.
 - If this is the case when the Coach edits the first draft, the Advocate should be encouraged to obtain firsthand information on the topic being shared in the report.
- ❖ Sources of information are always identified.
- ❖ Information gathered is dated and sequential.
- ❖ Each concern and strength listed should have information in the body of the report to support its inclusion in the final draft.
- ❖ We strive to include a strength for each member of the family.
- ❖ Recommendations should be outlined sequentially.
- ❖ Each recommendation should be based directly on a listed concern or strength.
- ❖ The editing checklist items should be reviewed before finalizing the report.
- ❖ Each report **MUST** be submitted to the Coordinator timely so that it can be submitted to the court on time.

If a Coach has not already participated in the first-year Advocate required training, *Report Writing*, you will be asked to participate in that training with one of your Advocates. It is critical to the Coach's success in meeting the expectations of the role to be well-versed in what is expected of Advocates for their court reports. That toolkit can also be used as a launching pad for coaching conversations you may have with your Advocates as you guide and mentor them while they write their first court report.

We provide more detailed information on editing a report following your pre-service training.

The **Coach's Quick Guide** will be used when editing and reviewing CASA Court Reports.





Activity: Editing a Report

Part 1: Your facilitator will hand out a CASA Report written by Advocate Miki Getz for a permanency hearing. As you read the report, perform edits and capture your thoughts about changes that could be made to make the report more objective and factual. Use the **Coach's Quick Guide** to help the editing process. *Think about how you might share your feedback in a courteous, respectful manner that highlights the strengths of the writer of the report and addresses improvements needed.*

Part 2: In pairs, role play a conversation with Miki. Let her know why you believe changes need to be made. Remember the behaviors of leaders: praise the strengths of the report, offer suggestions and only make a change if it's agreed upon by both you and the Advocate.

Part 3: When you are finished, we will have a discussion.

We provide additional training on editing reports as one of your first-year in-service trainings as a Coach.





Monitoring Advocate's Efforts and Case Oversight

The third type of duties that a Coach completes that are included within the pillar of *Supporting the Program* is monitoring Advocates efforts. Many of these tasks are completed in our CAMS system.

The specifics as outlined in the CASA Coach Description (*found on pages 3-5*) related to these types of duties include:

- Maintain minimum twice monthly contact with Advocates who have a case assignment to obtain case updates and address any issues.
- Remind Advocates of their responsibilities including CAMS entries, training hours, CAMS assessments, court hearings and report deadlines.
- Check email and phone messages (every other day) to timely respond to Advocates and their cases.
- Check CAMS (every other day) to timely view case notes and monthly updates.
- Check EDMS account regularly for court-related case updates and documents submitted.
- Document your own coach-related activities within CAMS.
- Communicate minimum once per month via email or phone conversation with your Program Coordinator to discuss Advocates supervised, case developments and other issues or concerns that have arisen.



Case Oversight: As a Coach, one of the most important things you can do is have good knowledge of the case by understanding the various parties and their roles, knowing the child's information such as age, level of placement, health, and educational needs and understanding the permanency goal.



You will find that being removed from the case even by one level will provide you with a certain level of objectivity that is hard to maintain when you're deeply involved in a case as Advocates. This level of objectivity is beneficial to providing a fresh lens into the case that the Advocate may need at times.

This case oversight is necessary when you are in a position to monitor the Advocates monthly activities. You are a consultant on the case; however, you are not in charge of the case.

You will be actively involved with assigning new cases to your Advocates as we explored earlier in this section. During these meetings, you will help the Advocate determine a plan on who they should talk with, making contact with the child and family, and even helping the Advocate identify additional training or skills they need to successfully understand the issues involved with the case. You will be completing the Advocate Case Action Plan with your Advocates and in doing these activities, you will gain an initial understanding of the case and what you will want to monitor in the Advocate's monthly efforts.

Advocates are required to submit a **Monthly CASA Advocate Update** in CAMS that goes directly to the Local Coordinator for their oversight since it is the Coordinator that is ultimately responsible for all volunteers that are involved in this program. This update is a way to bring together all of the Advocate's activities from the month into one 'document'. As the Coach, you will also review this update in CAMS on the case face sheet.



The creation of this Monthly Update is done by the CAMS system, based on the Advocate's case notes. It will be important for your understanding of what the Advocate has completed, to assess the type of feedback you can provide to the Advocate for their next steps on the case, and their level of case objectivity by regularly checking the CAMS case notes.

Case Notes are good opportunities to coach on skills such as writing in the first person or drafting objective narrative that might be incorporated into their Court Report, while also allowing you to verify that your Advocate is making the contacts needed each month.

Coaches document their own activity within the Volunteer Management Tab of their CAMS Dashboard. You will enter an administrative note, with a description and amount of time involved, such as:

"Spoke with Advocate A on the phone for 30 minutes about case issues and concerns they were experiencing about the current placement. Decided to loop Coordinator into the conversation as it may involve the need for the Coordinator to address concerns about DHS Caseworker."

This note does not go into the case record but is maintained within CAMS for Coordinator oversight of all their cases and all volunteer activities.



There are in-service trainings available to assist Coaches with case and Advocate oversight. In addition, we provide training for coaching the Advocate on completion of the Advocate Case Action Plan form, the Monthly CASA Advocate Update, and Case Notes.

As a Coach, you are the first back up person for an Advocate. You may be asked to attend a court hearing or family team meeting in place of your Advocate who is unable to attend. You also may be asked to help the Advocate create a plan for an absence such as a vacation or work commitment. If the absence is extended, you and the Advocate will need to plan for ensuring that someone is seeing the children every 30 days and making needed collateral contacts. These are important potential activities to plan for as a function of your case oversight activities.

There could be times when you are unavailable, such as when on vacation or dealing with a work schedule conflict. In those instances, you will be expected to be in communication with the Program Coordinator and all of your assigned Advocates to notify everyone and manage coverage for your coaching duties. This would include notifying the Coordinator in advance so they can be available to attend a court hearing with an Advocate if needed or for alternate ways of supporting your Advocate, e.g. during a tumultuous family team meeting.



Another part of case oversight will occur while you are editing your Advocate's court reports as we practiced earlier. Because you've had involvement since the very beginning of the case and monthly thereafter, you're well equipped to know if a court report is missing information or not reflecting accurate information. This will help you monitor your Advocate's activities between court hearings and

reports, to ensure the Advocate is following up on missing information, clarifying inaccuracies, or asking the relevant questions in order to complete the assessments addressing protective and promotive factors in the CAMS system.

Iowa Child Advocacy Board
Advocating for the protection of Iowa's children and strengthening the child welfare system

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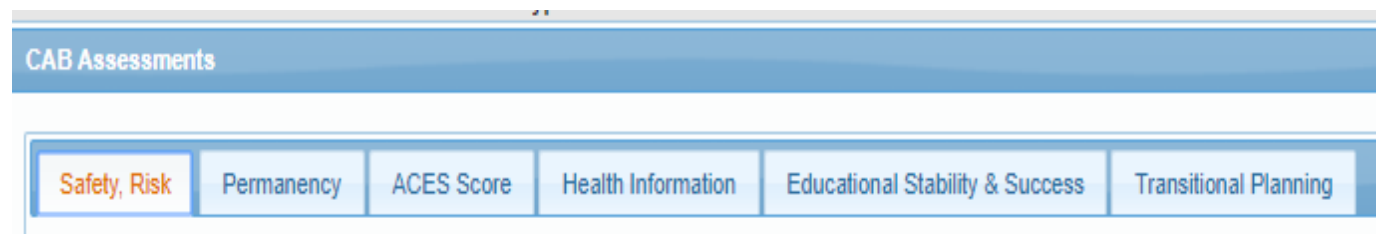
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Completing Child Assessments in CAMS: As a review of CASA Advocate duties, we ask that Advocates assess the protective and promotive factors outlined below, within the first 60 days of case assignment.

The Six Child Assessment Areas



Timing of Assessments

Assessment	Timing of Assessment
Initial Assessment	Within the first 60 days of assignment
Subsequent Assessments	A minimum of every 6 months *

(*) Best practice is to complete a subsequent assessment within 30 days of when the CASA Court Report is due to the Coach/Coordinator. Some jurisdictions may hold hearings every three months. Consult with the Coordinator to determine frequency of completing subsequent assessments. The assessment information will provide Advocates with current data that may prompt identification of strengths, concerns and recommendations for the court report.

The Advocate's responsibility for completing the assessments will be monitored by the Coach and requires case oversight knowledge to prompt Advocates on how they may gather the necessary information during their monthly contacts of fact-finding. The resource, **Child Assessment Tool**, can be obtained from our website under Forms and Resources to review instructions and rationales for the CAMS assessments.

**Key coaching points to remember regarding
CAMS Assessments:**

- ❖ Make sure the Advocate completes these assessments on time.
- ❖ Completing the assessments is a formal way to think through the concept of child well-being in terms of physical, behavioral, social and cognitive areas. An initial assessment provides a baseline of information. It also provides reminders for information Advocates should collect during the investigation stage to “fill in the gaps” of their case knowledge.
- ❖ It is likely that an Advocate will NOT know all the answers the first time an assessment is completed.
- ❖ Questions that an Advocate does not know the answer to, which are the “Unknown”, are then the questions Advocates need to incorporate into their case action plan for who to contact to gather the information, as part of the investigation and information gathering needed through the Advocate’s contacts on the case.
- ❖ Ultimately, knowing the answers to the questions asked in the various assessments will provide Advocates with well-rounded information to complete court report narratives and identify fact-based strengths and concerns that ultimately lead to stronger recommendations to the court.
- ❖ The collected information leads to stronger and more informed recommendations to the court and helps judges make informed decisions.
- ❖ There are reference sheets for each section of the CAMS Assessment at the end of the Advocate training resource: **Child Assessment Tool** (pages 44-53 of tool). Advocates can print the reference sheets off as needed to help them remember the questions they want to gather information about in order to complete the CAMS Child Assessments throughout the life of the case.

As the Coach you can prompt the Advocate by asking:



- Where or from whom can the Advocate best get the answer to this question?
- How will the answer increase the Advocate's awareness about the child or the child's situation?
- What follow-up or additional information may be needed to be assess this issue?
- If no one knows the answer to this question, what recommendation might the Advocate make to address the issue?



Note that with all the segments, it is best practice for the Advocate to enter a case note regarding any increase or decrease in the overall assessment scores.

- The note should include specific information about progress or regression for key areas.
- Use this information to identify strengths and/or concerns for the CASA report.
- This information may also help the Advocate formulate recommendations to address unmet needs or areas of concern.

As a Coach, you can identify areas that you perceive your Advocate might benefit from additional training. Completing the CAMS Assessment might be one such training area that you can encourage your Advocate to participate in with their Coordinator.



For brief review of the **CASA Advocate** responsibilities and duties that the Coach will monitor and support to meet their Advocate's minimum role requirements include:

- ❖ MAINTAIN CONFIDENTIALITY as outlined in the Code of Iowa, National CASA and Iowa standards.
- ❖ Review case records
- ❖ Research/gather information
- ❖ Participate in case staffings, family team meetings, and court hearings
- ❖ Establish rapport and a relationship with the child
- ❖ Meet with the child regularly (at least one time per month)
- ❖ Establish rapport and relationships with parties in the case
- ❖ Assess the child's physical, medical, behavioral, and educational needs
- ❖ Observe parent/child visits
- ❖ Monitor the child's placement
- ❖ Identify service needs
- ❖ Document all activities completed for the purpose of the case
- ❖ Submit monthly reports on the specified due date
- ❖ Contact CASA Coach on a monthly basis (at a minimum)
- ❖ Write a court report (if required) for each hearing
- ❖ Submit finalized court reports 2 weeks prior to each hearing
- ❖ Complete a minimum of 12 hours of ongoing training each calendar year
- ❖ Comply with CASA policies and procedures
- ❖ Remain court-appointed until the case is closed



Collaborative Communication and Relationship Building

The fourth category of tasks in the pillar of how our Coaches *Support the Program* is by being a collaborator, working alongside the Local Coordinator in building relationships with Advocates. It is the meaningful relationships forged through honest and genuine communication, and the Advocate's internal motivation to do this volunteer service, that brings value and purpose, which retains effectively trained Advocates in our program.

The CASA Program is a volunteer managed program as much as it is also a child advocacy program. Because we are in the business of managing the people that come to volunteer for us, it is vital that all of our volunteers, Coaches and Advocates, understand the role s/he is to perform and the desired tasks and goals that are to be met. This is where good role descriptions and effective training begins to address that issue.

Evaluations, or in our organization, **Mutual Reviews**, are another type of opportunity where we guide our volunteer's understanding of the important role they play in our organization. It is when progress and areas for improvement can be discussed. It is a process with an important communication competency of the ability to listen, both to the volunteer's enthusiastic review of a positive experience, as well as to his/her concerns, issues and suggestions about the program, their role or how they are supervised.



Volunteer Management Elements



The concept of actually evaluating volunteers may seem strange. After all, these individuals are freely giving their time. Putting them through an evaluation may seem unfair and even unappreciative. The truth is, however, that these “unpaid staff” committed to the CASA Program mission are anticipating something in return for their efforts.

Among other more personal motivations for volunteering, they expect a well-run program filled with dedicated and competent paid and unpaid staff. By completing evaluations, we send a clear message that we are administering a serious program of court-appointed child advocates. These reviews also ensure that Advocates are utilizing the learning resources available to them, so they can be successful in meeting their role expectations. No one enjoys finding out that they missed the mark, and they missed the mark because they were not clear on what that mark truly was supposed to be. Mutual Reviews allow for the process of recalibrating or celebrating successes, to occur timely during their tenure as a volunteer.

As a Coach, you will play a role in the Mutual Review of your assigned Advocates. ICAB policy outlines that Advocates are to be reviewed within 6 months of case assignment, and annually thereafter. The Program Coordinator receives notification within the CAMS system that it is time for this Mutual Review to be completed. They will reach out to you, the Advocate’s assigned Coach, to complete your small piece of that review process within CAMS.

The questions asked of the Advocate during the Mutual Review that you can provide feedback on regarding the Advocate are:

1. What are you particularly proud of having achieved as a CASA Advocate?
2. What has been difficult in regard to your advocate duties? Identify barriers and suggestions for how to address the issue.
3. What particular aspects of being a CASA Advocate give you satisfaction?
4. What assistance and support have you received from the Coordinator or Coach that enables you to fulfill your role? Has it been enough?
5. What additional training have you received or participated in during this reporting period? Include suggestions for additional training needs.

We provide an annual in-service training for our Coaches, *Touching Base on Coaching Basics* to review the coaching role and responsibilities. Specific review of case assignment protocols, utilizing CAMS, CASA report editing best practices, and being the face of CASA in court and in the community, are included in this particular training session. In addition, the annual update to program policy and procedures are covered with the opportunity to complete the mutual review process between the Coordinator and Coach.



The next pillar that will outline specific coaching tasks is *Supporting the Advocate*. Our experienced Coaches have shared that this pillar brings them an increased sense of being part of a CASA team, the knowledge that they are assisting in developing another resourceful advocate in the life of a child, and at times, has created meaningful friendships that will last beyond their volunteer time with the ICAB organization.



Pillar of Supporting the Advocate

Module 1 shared a number of important foundational concepts that ICAB has found assist our Coaches in supporting our Advocates and will be reviewed here as well. These include striving to be a servant leader, being a situational leader when called upon by understanding how to ‘coach’ Advocates versus ‘direct’ Advocates in their independent role to the Judge, and maintaining timely, professional and courteous communication in all aspects of the coaching role.

Another key issue and skill which we will spend time on during this module is how understanding the specific issues of each case and the DHS CPP’s child well-being domains are helpful to supporting and guiding the Advocate’s ongoing efforts. This helps the newly trained Advocate gain a foothold in a challenging child welfare world that uses terminology and practices that are often unfamiliar to the caring, committed volunteer that comes to our organization.

Ultimately, this child welfare knowledge and deciphering of case issues and case plans helps the child so that their safety and well-being needs will be met. Our Coaches have influence on the lives of children, within the scope of their unique role, by supporting the Advocate within their role. We will discuss

this more later in the training when we explore how coaching tasks are an important pillar for *Supporting the Child*.

The roles you fulfill as a Coach will be many and varied. You may find that at some stage in your role you will be:



- ❖ **Advisor** - Advising Advocates on the work they will be conducting and what they need to be prepared.
- ❖ **Assessor** - Assessing Advocates' performance as they work their cases.
- ❖ **Counselor** - Resolving emotional problems on the basis that sharing anxieties can be both relieving and reassuring.
- ❖ **Demonstrator** - Demonstrating to the Advocates the skill you require them to perform.
- ❖ **Facilitator** - Identifying suitable cases for them based on their strengths, goals and their personal objectives as Advocates.
- ❖ **Fact finder** - Assisting the Advocate in gathering information related to resources available.
- ❖ **Friend** - Over the years of working with an Advocate a personal relationship may be built where you also become a friend, someone who they can discuss their problems or share their successes with. It is important to keep personal information confidential because if you do not, respect and trust will be lost.
- ❖ **Fountain of knowledge** - This may be part of the 'Advisor' role, in that you will often be asked questions on anything related to child welfare based on your experiences, either personally or professionally.
- ❖ **Instructor** - Instructing Advocates in the skills of their advocacy efforts.
- ❖ **Mentor** - Walking alongside an Advocate as they move through this journey, as a resource for questions and a sounding board for decisions and feelings.
- ❖ **Motivator** - Inspiring the motivation of your Advocates.

- ❖ **Organizer and Planner** - Assisting the Advocate as they plan for the work on their case.
- ❖ **Role Model** - A person who serves as a model in a particular behavioral or social role for another person to emulate. The way you conduct yourself while in the presence of your Advocates provides an example of how they should behave, i.e. what sort of example should we be providing to parents? This is perhaps one of the most important roles of a Coach.
- ❖ **Supporter** - Events such as court can be a nerve-racking experience for some Advocates. Often, they like you to be present to help support them through the pressures. The role of a 'Friend' and perhaps 'Counselor' are part of this as well.

Adapted from 'Coaching Roles and Skills' (c) 2015, BrianMac Sports Coach, <http://www.brianmac.co.uk/coachsr.htm>

Coaching another adult is a relationship of partners based on trust and respect.

The Coach is a guide to the other person, who is striving to reach a goal such as a feeling of fulfillment by effectively advocating for a child or providing an independent objective lens for the Juvenile Court Judge.

Coaching is	Coaching isn't
❖ Creating a safe, confidential environment	❖ A competitive environment
❖ Providing resources	❖ Being "in charge"
❖ Recognizing that the individual can take responsibility for his/her own decisions	❖ Telling the person what to do
❖ Guiding another person	❖ Saying, "You should do this"; being opinionated
❖ Sharing ideas	❖ Managing the person
❖ Managing the process	❖ Sharing how much he/she knows
❖ Encouraging a partner's development	❖ Stating what is wrong with the Advocate's ideas
❖ Cheering on/supporting	

As a Coach, your ability to forge the relationship with your assigned Advocate can also be assisted by reminding them how their values match the CASA Program's values. When an individual's personal values match the organizational values in which they are spending their volunteer time, then their retention rate (length of time of service) with that program is increased. Thus, any time you spend reminding our Advocates that matched values may be true for themselves can be instrumental in our volunteer retention rate.



As you thought about your own personal values in Module 1, you can inquire with your Advocates what their values are that bring them to the Advocate role. This activity can guide a positive conversation; it may inspire your Advocates and help you connect with them over what they care about most.

Connecting with your Advocates in this way can be an important first step in establishing solid relationships and in providing this pillar of support as a Coach. The CASA Program is strengthened when our Advocates and Coaches are in mutually satisfying relationships. Various theories, frameworks, and concepts exist about how to best develop relationships in the professional setting. You may have had your own past experiences with someone that was a successful mentor of sorts to you that utilized certain techniques to build that relationship. Of the many approaches that exist we find that being a servant leader, genuinely caring about the success of the person you are supporting, is an asset as a Coach.



Communicating and Relationship Building as a Servant Leader

Effective communication skills are the benchmark for good Coaches. Every aspect of the role requires good communication. As a Coach, your ability to be a strong pillar for *Supporting the Advocate* will be enhanced by the competencies you bring to your role.

As you read in Module 1, ICAB is committed to building our programs on the timeless concept of Servant Leadership (SL). Research shows us that the desire to serve is hardwired into human beings. And when you consider what we do, it is very much hard-wired into the work of ICAB. When we each acknowledge the strengths and benefits of what we innately have to offer in our positions, it truly fits our desires to help make things better in our world. Servant Leaders see the common good and serve it; they want to enrich as much of the world as they can.

Servant Leadership has nothing to do with one's place in the organizational hierarchy.



"The best place for a leader isn't always the top position. It isn't the most prominent or powerful place. It's the place where he or she can serve the best and add the most value to other people." ~ John C. Maxwell

At ICAB, we first and foremost serve volunteers who serve abused and neglected children. They are truly the face, the reputation, and representation of CASA before hundreds of professionals and judges across the state.

Our volunteers become all that we claim they are: Advocates for vulnerable children – independent – respected – professional - community members with common sense and wisdom. They are someone who will effectively influence the system to change a child's life for the better; and most importantly, our volunteers become a trustworthy constant in hundreds of children's lives.

Our CASA Advocates do this work best – because they follow your example of being Servant Leaders. As a servant leader you possess three key qualities: humility, generosity, and foresight. You influence and empower your Advocates by sharing organizational authority. Advocates claim a stake in the outcome. They grow stronger, more confident, wiser and more autonomous. They derive great meaning from belonging to something greater than themselves. They take pride in the work they are doing for children, no matter how difficult it may be. This all is in large part because you as a Coach have helped them realize their value and the value in serving children to the best of their ability.



Servant leadership is one of the foundational concepts that helps define what it is a Coach does and does not do. Recognizing how you communicate with the Advocate will directly or indirectly show them your approach to your coaching role. If you are overly directive in your communications with Advocates, it might suggest that you are not there to support their individual efforts, but in place to control the case through managing the Advocate's "strings". Leadership embeds the capacity for greatness in the people and practices of an organization by encouraging autonomy. If you don't return phone calls timely, or make yourself available to answer questions, it might suggest that you are not invested in your coaching role of supporting their advocacy efforts.

As the first back up person for an Advocate, Coaches demonstrate servant leadership. You may be assigned a new Advocate who is brand new to the juvenile court system. They may ask if you're available to attend a court hearing or perhaps attend their first Family Team Meeting with them. We encourage you to attend these "new" events as needed as a mechanism of support for the Advocate. However, as a team we also are working toward creating well-trained, autonomous Advocates who feel confident attending these events by themselves.



Part of coaching is determining when to hold on and when to let go. If you've determined that an Advocate can do these types of activities by themselves (i.e. "You got this!") and the Advocate feels differently, please don't hesitate to contact your Coordinator for assistance.



The capacity for “greatness” is in all of us.

Activity: Video and Group Discussion:

After watching the video, consider how you could help your Advocates find their “greatness” with the four principles:

1. Giving away control
2. Enhance the competence they already possess
3. Projecting Clarity
4. Having Courage

Adapted from Leadership Training for Staff and Peer Coordinators, 2015, Michael Heaton, Qtrends365, Consultant for NCASA.

As the video demonstrated, effectiveness is increased when leaders embed greatness in others by changing their approach from expecting ‘follow the leader’ to trusting their team to act with their own authority. This is accomplished by providing psychological ownership through trust, competence and clarity. A worthy goal of the CASA Program is to create an environment for autonomous thinking.

There are times, however, when Advocates who have the authority to act without seeking direction or feedback from their Coach or Coordinator are behaving in ways that are frustrating or even painfully difficult. Perhaps they are not returning any form of communication to the Coach, you receive feedback that they are being abrupt with other professionals on the case, or they outright refuse to gather information from all parties as they have already formed their biased recommendations for the child's permanency plan.



How does a Coach handle those situations with a Servant Leadership approach?

Activity: Servant Leadership in Action

Part 1: One of the Advocates on your team is demonstrating difficult behaviors.

- How will you address this as a Servant Leader? Consider your communication techniques and relationship building ideas.
- How do you share this struggle with the Coordinator?

Part 2: Discuss ideas as a group and clarify the role of Coach and Coordinator.

In ICAB, assuming we have screened and trained our Advocates well, each Advocate becomes the expert on their own case. After some time, they know the child best, have visited their home, talked to key people in the child's life, and learned a great deal about the entire situation in order to represent a child's best interest. Your guidance is needed in many ways; and sometimes it is not.



Advocates will demonstrate behavioral tendencies that will help you determine what kind of coaching will serve them best. By determining an Advocate's **commitment level** and **competence level**, you can individualize your coaching to what works best for the Advocate.

Competence: We must consider the knowledge, skills and relevant experience the Advocate has, along with how confident they are with the knowledge he/she gained during the pre-service training. Our staff members have done a similar analysis when deciding to ask you to be a CASA Coach. An Advocate with high competence may appear confident with the logistical part of their role, but uncertain of more of the human elements such as talking with children or setting aside their own values when advocating.

Competence is made of three factors:



Commitment: Does it appear the Advocate is confident, motivated and eager to provide quality advocacy for the child? Commitment is well-intentioned but doesn't always equal outstanding advocacy. It's easy to feel committed to such an important cause. It's not always easy to stay engaged when commitment isn't continually reassured. Commitment is not gauged on just words, but rather those words put into action. An Advocate's actions will help you define their commitment level.

Commitment is made of three factors:



(Adapted from Leadership Training for Staff and Peer Coordinators, 2015, Michael Heaton, Qtrends365, Consultant for NCASA.)

Activity: Coaching Scenarios

Let's practice serving Advocates with different levels of competence and commitment. You are assigned to one of these Advocates. How could you serve them best?

Scenario 1: Jane**Scenario 2:** John**Scenario 3:** Mindy**Scenario 4:** Mariana

Discuss the challenges and opportunities of working with an Advocate like the one portrayed in the scenario.

- What could you do as a Coach to help the Advocate reach a higher level of competence or commitment?
- What kind of coaching techniques would you utilize when working with this volunteer?
- Are there possible challenges with retention for this type of volunteer?
- How do you communicate this with a servant leader's heart?

When reflecting on the previous experiences of our Coaches, our Staff have found a Coach generally does one of three things:

1. Match their style to the Advocate's needs
2. Over-supervise the Advocate
3. Under-supervise the Advocate



You will find you will be most successful when you match your style to the needs of each Advocate. Not surprisingly, over-supervision and under-supervision conclude with many of the same resulting behaviors such as reduced involvement in the case, frustration, resentment, less self-initiative and ineffective advocacy, which ultimately creates risk for the child and the CASA program.

Adapted from Leadership Training for Staff and Peer Coordinators, 2015, Michael Heaton, Qtrends365, Consultant for NCASA.



Situational Leadership for Challenging Times

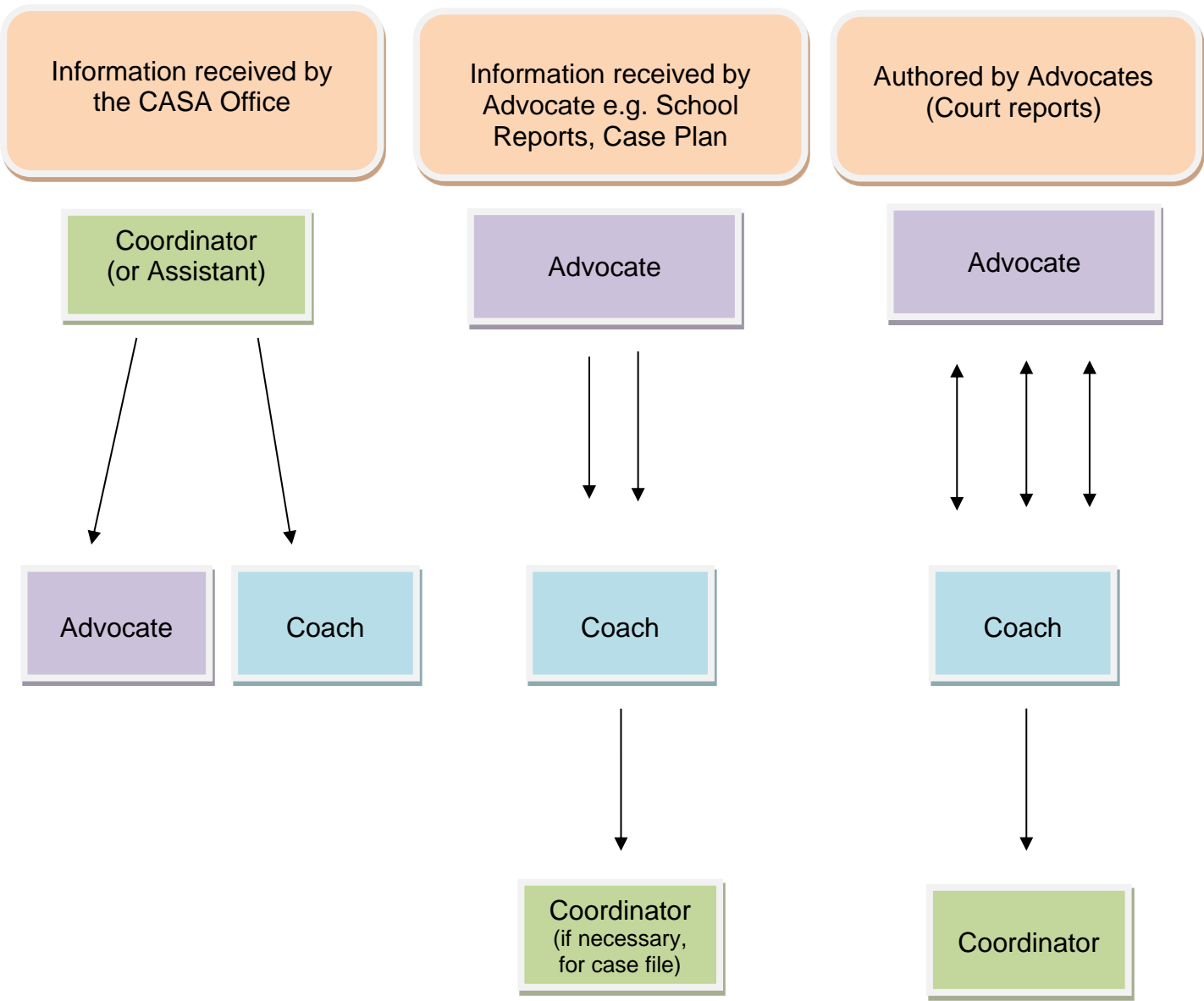
As you read in Module 1, part of being a Coach is recognizing that you are a leader of a team, and in the role as a Situational Leader, you will need to implement the authority that comes with the Coach role to support and redirect your assigned Advocates. This is primarily seen when Advocates are unsure of their role, of their next steps in their role, or when the Advocate is no longer meeting role expectations.

Some common situations where we find it is important to understand the Advocate's needs and practice good communication skills are when:

- ❖ The case seems to need more hands-on supportive direction, yet we recognize we are not the assigned Advocate to manage the advocacy efforts of the case but the cheerleader for the Advocate's hard work.
- ❖ Boundaries are unclear or need to be reestablished.
- ❖ Court reports need to be written and edited with feedback provided to the Advocate.
- ❖ Expectations of the Advocate role are not being met.

Our seasoned Coaches have shared that one of the most beneficial pieces of information to have clarity on when dealing with these challenging situations is the communication and flow of information within the program. Coaches who are dealing with one of the above situations will need to assess when the necessary conversation with the Advocate remains the responsibility of the Coach and when it rises to the level of needing to be addressed by the Local Coordinator.

ADVOCATE to COACH to COORDINATOR - FLOW OF INFORMATION



As we outlined, understanding the chain of command benefits you in recognizing what role you play in the communication process for supporting the Advocate while answering questions on when and how to handle difficult situations.

Common Situational Leadership attributes that are helpful:

1. Flexibility

The fundamental idea of situational leadership is that there is no such thing as a single best or fixed type of leadership. Leadership changes according to the requirements of the Advocate or agency, and successful leaders are able to be flexible and adapt their style of leadership to the experiences of the Advocate that they're trying to lead.

2. Changes according to the situation

The leadership style that the situational leader brings into play will be dependent on the situation at hand and the development level of the Advocates involved. If the training and development level is low, the situational leader becomes more task oriented. If the individuals are sufficiently trained and developed, the leader will be more supportive.

3. Directing

Situational leadership will be high on the “directive” aspect when the Advocates in our organization are not sufficiently developed and need more hands on, and at times, constant supervision. This is generally found with Advocates initially after being sworn in by the Judge and recently assigned to their first case. Here, the leader gives specific instructions about what the goals are, and the steps of how the goals need to be achieved. It includes direction on some of the behind the scenes activities an Advocate completes, such as noting their contacts in CAMS, but is much less directing when it comes to the personal interactions the Advocates have with the other parties connected to the case.

4. Coaching

If the situation demands it, the leader will also coach their Advocate. This is an extension of the directive approach; the leader still provides detailed instructions, but they also focus on encouraging the Advocate by soliciting the Advocate's inputs and explaining why certain decisions have been made about the various roles and expectations.

5. Participating

The situational leader may try to encourage an Advocate to become more independent performing the tasks by demonstrating that as the Advocate, it is their case assigned to them, with the Coach's involvement as secondary. Coaches have input into high-level problem-solving that may be necessary on the case, but they allow Advocates to own the decision-making process for their own case. A Coach will be participatory during the case assignment process. You may participate as needed by attending a family team meeting with an Advocate, or in their place, etc.

6. Delegating

When dealing with a highly mature and capable Advocate, the situational leader will gradually reduce their supervision and involvement in the daily activities of the Advocate. The leader is involved while discussing the tasks and agreeing on the goals to be achieved, but after that, Advocates have autonomy on how they want to accomplish the goals. Coordinators have found that as Advocates gain experience in their role, they highly appreciate the autonomy that comes with the Advocate role.

7. Integrity

The situational leader does not change their approach merely to take advantage of the situation or control the situation to match what they believe they want to see occur. They simply adapt in a way that is most appropriate considering factors such as the maturity level of the Advocates, the organizational structure and culture, and the goals to be achieved. They do so with integrity and are not motivated by a desire to unfairly capitalize on the weaknesses of the Advocate or agency.

At times, it can be challenging to Coach another Advocate and to separate your own personal perceptions of what is in a child's best interests, from your Advocate's recommendations, when those two positions are not similar. Integrity within the Coach role means allowing the Advocate to present their independent fact-finding and resultant strengths, concerns and recommendations to the court. The Coach does not change the intent of the Advocate's court report. They guide and coach the Advocate to consider additional options and alternatives but maintain the integrity of the independent role of Advocate.

8. Courage

It takes a lot of courage for a leader to try out different leadership approaches and figure out which one is ideal. Most leaders stick to a particular way of doing things – whatever has worked best for them in the past. But a situational leader is not afraid to take chances and to adopt a radically different leadership style if the situation demands it. Coaches often come to this unique role with previous experiences in supervisory capacities. Having the courage to try a different leadership approach with your assigned Advocates than in past work experiences may be warranted.

9. Clear vision

The situational leader has a clear vision of where the team is headed while advocating for the best interests of all of the children assigned to each Advocate. This is what allows a leader to identify and adopt the most effective behaviors and strategies to reach the goal of serving more children involved in the child welfare system through the CASA Program's efforts.

10. Humility

The situational leader does not claim to know it all. With a group of highly developed and mature Advocates, they have the humility to accept their limitations and allow the experience and perceptions of the Advocates themselves to shine.

Adapted from: <https://yscouts.com/10-situational-leadership-characteristics/>

The following are some of the challenges you may encounter:

- Lack of initiative
- Lack of follow-through on monthly contacts
- Feelings of being overwhelmed are not managed by the Advocate
- Writing skills for the report which require feedback and the Advocate appears to not accept supervision or direction
- Time management
- Personal biases
- Lack of objectivity
- Personal life crisis
- Lack of professionalism
- Inappropriate behaviors or comments
- Intense emotional response or reactions

Activity: Supporting the Advocate

Part 1: One of the Advocates on your team seems to have lost their commitment and motivation to meet the role expectations.

- How will you address this?
- When do you communicate your concern with the Coordinator?

Part 2: Discuss ideas as a group and clarify role expectations if there are questions.

Here are some basic supportive leadership practices:

- ❖ Develop a warm, cordial relationship from the start. Get to know your Advocates and learn about them. This will help you be able to better give constructive criticism when it is needed.
- ❖ Decide how important the issue is. Is it something a gentle suggestion from you can solve? Is it a one-time problem?
- ❖ If it is not something important, note it in the Administrative Notes section of CAMS and continue to be observant. If it appears to be due to external and temporary circumstances, discuss it with the Advocate and problem-solve together.

- ❖ If it is neither trivial nor due to a temporary issue with an otherwise good Advocate, then do the following:
 1. Discuss the issues with the Coordinator if input is needed or just to apprise him/her that there may be a problem.
 2. Have a face to face meeting with the Advocate.
 3. Review expectations that have been set with the Advocate.
 4. Reiterate the Advocate's responsibilities, establish clear guidelines, and restate boundaries.

- ❖ Address the issues as quickly as possible in a calm, non-threatening way.
 1. Don't make assumptions. Check facts. Ask for and listen to all information.
 2. Reaffirm support of the Advocate and the desire for their success.
 3. Then be specific. Express concern for the Advocate and the child.
 4. Discuss ways to handle a situation differently.
 5. Clarify any action items he/she needs to complete the timeline.
 6. Offer support in future situations to problem-solve prior to taking action.
 7. Document the issue(s) and the date(s) in CAMS as an Administrative Note that you spoke with the Advocate about his/her performance and what steps were agreed to.

Always discuss any significant issues with the Coordinator. In addition to being a resource for you, the Coordinator may receive phone calls about an Advocate and needs to be informed and knowledgeable. If there is a question about whether the Advocate should be removed from the role, the Coordinator will consider your input and it is the Coordinator that makes the decision.



Managing Risk and Troubleshooting Problems: Coaching When Things Get Stuck

In the previous sections, we examined the two complimentary aspects of your role: The Coach who inspires and motivates as Servant Leaders and the Coach who helps define Advocate's expectations and holds people accountable.

Bringing these two together and mixing in our own unique personality is the way to develop authentic and energized relationships with Advocates. Those real relationships are your number one asset in helping the CASA Program manage risks and troubleshoot problems while supporting the Advocate in appropriately meeting their role expectations.



Real risks exist in programs that manage volunteers, even when applicants are perfect for the role. Even when advocates have had years of successful CASA service, they can still slip into irresponsible behavior, become too attached to a certain child, or take unnecessary risks. Our Coaches help Advocates stay within the scope of their advocacy role and continue to follow the program's policy and procedures. When Advocates and Coaches step outside the box of the program's policies, it can damage the program's integrity and eventually could damage the program's ability to serve children.

Coaches must understand the policy and procedures of the program so that they can safely guide and support the Advocates efforts. You need to be vigilant, follow gut feelings and intervene early, preferably before a problem can arise.

Part of relationship building is knowing that there are times when you must directly and unapologetically supervise. That may mean

speaking directly with the Advocate about your concerns or going directly to the Local Coordinator to address the issue and hold people accountable.



We will provide annual training on the Program's updated Policy and Procedural manual so you are aware of changes and can review critical policy issues. You can quickly access our current Advocate Policy and Procedural Manual by using the link to our website: <https://childadvocacy.iowa.gov/casa/current-casa-advocates>

The Iowa Program recognizes that many of our volunteers who come to serve in the capacity of a CASA Coach or CASA Advocate want to be “Iowa Nice”. However, being nice also involves being serious, being real, talking about problems and saying when things aren't working. When problems do arise, emotional intelligence, good communication skills and the willpower to face difficult situations are needed. Let's take a look at some of the commonplace risks and trouble areas of CASA work: off-limits activities, breaching confidentiality, and safety concerns.

Off-limits activities

There are certain precautions that need to always be taken, and certain problems that will require troubleshooting. A Coach should intervene immediately with an Advocate if they learned about information related to certain behaviors.



The CASA Advocate **shall not** engage in the following activities:

- taking a child to the volunteer's home or any home other than the child's
- giving legal advice or therapeutic counseling
- making placement arrangements for the child
- giving money or expensive gifts to the child, the child's family or the caregiver
- taking a child on an overnight outing or entertainment-based activities
- signing permission slips for the child

- transporting a child or family member without following Iowa CASA Program Policy
- breaking confidentiality
- using inappropriate language or participating in verbal altercation with any party

Activity: Troubleshooting Risks: You believe one of your Advocates has acted outside the boundaries of the role as outlined in the scenarios included in the handout.

How do you handle this situation as a Coach?

Breaking confidentiality

The law is very clear when it comes to confidentiality and the role of the Advocate and the CASA Program. Our policy is also very clear on what that means within our individual roles. You and the Advocate sign agreements on maintaining confidentiality in order to become sworn into the CASA Program. Additionally, when you sign an acceptance of a case, you're agreeing to only disclose case-related information to the parties who have authority to receive it, such as the County Attorney, DHS, CASA Program staff and child's attorney/Guardian Ad Litem.

Failing to maintain the confidential nature of the CASA case information is a serious violation of not only the child and family's trust, but it is a violation of Iowa Code section 232.147. To that end, our program maintains a zero-tolerance stance. If you learn that an Advocate has violated confidentiality, purposefully or inadvertently, you must notify the Coordinator. The Coordinator will investigate the circumstances of the breach. If confirmed, the Advocate will be removed from the CASA Program. If the Coordinator learns that the Coach knew of the breach and didn't report it or that the Coach was involved in the breach of confidential information, the Coach would be removed from the program as well. It's a tough policy, but one that must exist to protect children's information and uphold Iowa Code.

Activity: Confidentiality Dilemmas: Complete the Confidentiality Breach scenarios.

The following two charts can be helpful as a quick guide to confidentiality.

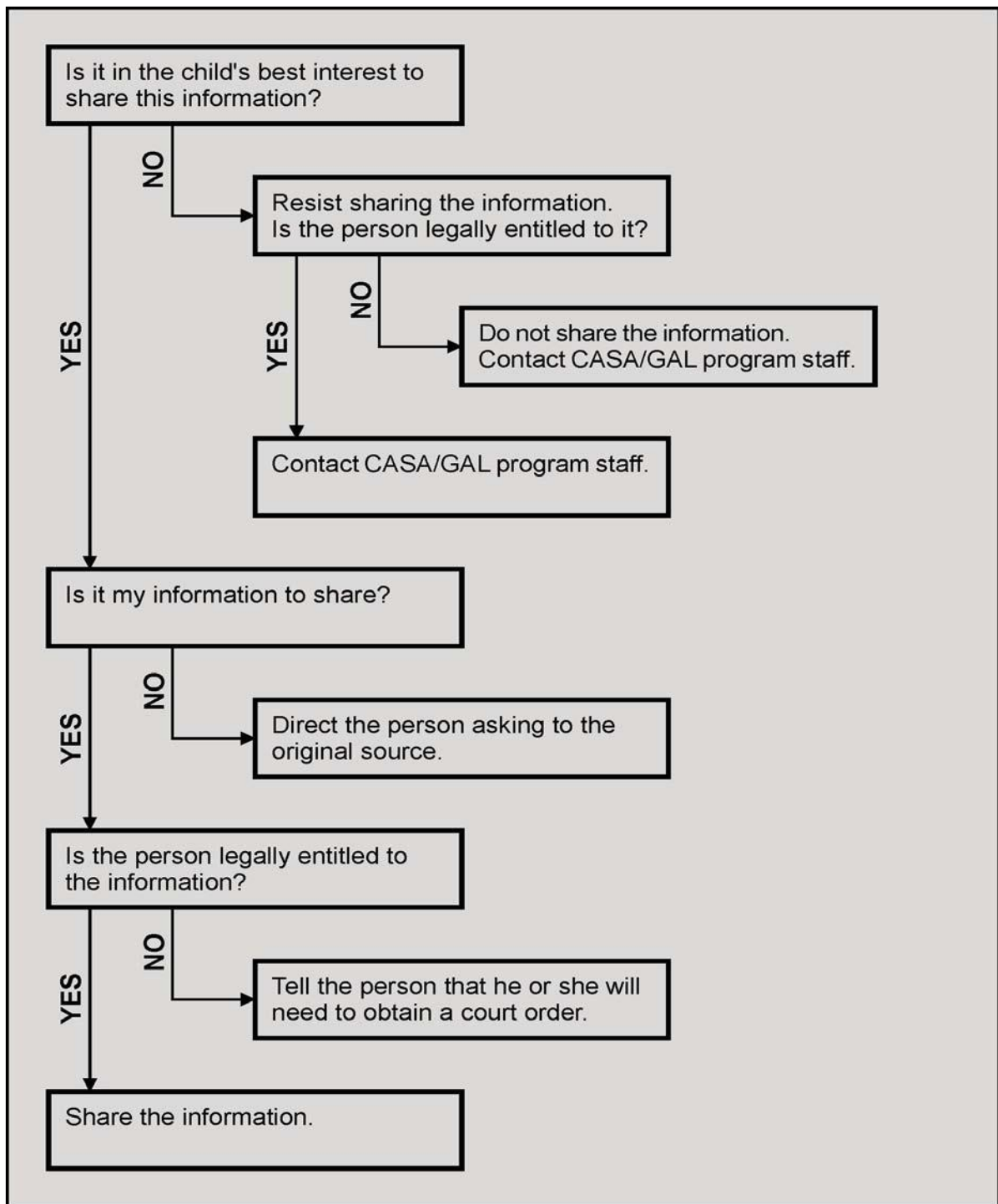
Remember it is easier to be a sponge and not get squeezed than to error on getting squeezed and realize you can't soak that information back up.



Case Party Privilege of Information

Case party:	Advocate can collect information from this party	Advocate can release information to this party
DHS	Yes	Yes
JCO	Yes	Yes
County Attorney	Yes	Yes
Guardian Ad Litem/Child's Attorney	Yes	Yes
Parent's Attorney	Yes	Only in a Report to Court, at a FTDM, YTDM or during FCRB testimony
Pre-Adoptive placement after permanency goal changed to adoption	Yes	Only in a Report to Court, at a FTDM, YTDM or during FCRB testimony
Intervener	Yes	Only in a Report to Court, at a FTDM, YTDM or during FCRB testimony
Foster Parent	Yes	No - only if party is present during FTDM, YTDM or FCRB
Relative Caregiver	Yes	No - only if party is present during FTDM, YTDM or FCRB
Provider	Yes	No - only if party is present during FTDM, YTDM or FCRB
Therapist/Doctor	Yes	No - only if party is present during FTDM, YTDM or FCRB
Teacher/Childcare provider	Yes	No - only if party is present during FTDM, YTDM or FCRB

Should this information be shared with someone else about this child or this case?



Safety for children, volunteers and the CASA program

There are three categories in which problems and risks arise in CASA service regarding the safety of children, the safety of volunteers, and the safety of the organization as a whole.

Safety for children

The entire purpose of CASA work is to increase safety for children and to assist in pursuing their best interests. An example of a risk involving child safety is the issue of transportation. Volunteers who transport children in their cars take the risk of car accidents, of being alone with a child and vulnerable to claims of abuse, and of breaking boundaries with a child.



There's valid justification for the action of transportation. If you can't transport a child, it can impact their ability to bond. If you can't take the child out for walk in the park, you may not be able to provide a comforting environment to help them relax. But the choice to transport children must always be weighed against the risks. You will assist Advocates in completing their Consent to Transport form and ensure the proper documentation is provided, if this becomes an important element of the Advocate's monthly contacts with the child.

Both program and volunteers balance risks and rewards to determine the safest course of action in the big picture.

Safety for volunteers

There are no documented cases of crimes being committed against CASA volunteers during, or as a result of, their service. Volunteering is, by and large, a safe experience. That said, there are certain precautions that need to always be taken, and certain problems that will require troubleshooting.

Many children in the system come from homes that experience poverty or substance use. This is not to say that the homes are dangerous, but volunteers need to use their common sense and gut feelings and not go into any environment where they don't feel safe. This is true for our Advocates

and our Coaches. There are ways to complete the work of a CASA without putting themselves in danger and you can help find alternatives.

On another note, volunteers may sometimes be drawn to serve children because in part, they have unresolved childhood trauma of their own. Compassion for others is often motivated by our own experiences of suffering; wanting to prevent that or improve outcomes for others is natural. But that can also motivate problems of boundaries.

Permeable or broken boundaries are not safe for volunteers. It puts them at emotional risk, as well as puts the reputation of the organization at risk. These risks can be managed by frank conversations between Coaches and Advocates and training by program staff. It is important that Coaches be aware of any Advocate that has boundary issues and share those with the Local Coordinator. It may be addressed through intentional training, or it may rise to the level that it necessitates that the Advocate must be removed from the case.

Failing to address these kinds of risks can lead to the next safety area of paramount concern for the longevity of the CASA Program.

Safety of the reputation of our organization and brand

The trust the public places in CASA is a huge resource – and is well-deserved. But being a national organization, any big problems, negative media attention, rumors or organizational vulnerabilities can filter both up and down.

New prospective volunteers have to go through a criminal background check and answer questions they may have never before encountered during their personal interview with the Local Coordinator. It can feel like a very intrusive process, especially if they have not seen the less cheerful side of our world. But these measures are crucial to make sure that nothing takes place that could hurt a child or affect the good reputation CASA holds in the public eye.



It is because of the trust and reputation of the CASA Program in the eyes of Judges, Attorneys, DHS, Service Providers, our local communities, our State of Iowa Government, and in society at large, that we must be vigilant in vetting our Advocates and Coaches thoroughly. It is not a “right” to be a CASA Advocate or Coach, it is a privilege.

Minimizing Risk

Prevent problems by forming teams



Teams are an important part of risk management. Being connected to and observed by other volunteers helps people self-regulate their behavior. People are less likely to break rules or initiate boundary-breaking behavior if they are regularly checking in with peers. They can safely discuss any impulses they have and hear good reasons for not following them from other volunteers.

Make sure someone is always available

In order to head off problems, someone needs to be a phone call away for volunteers, be it the Local Coordinator, the Coach, or another staff person. Advocates need to know they have an outlet and can seek help, express their frustrations, ask for advice, or just vent their feelings. These conversations can reroute people away from inappropriate actions, recommend alternatives and/or prevent burnout. Coaches can ensure that all Advocates have been provided with an emergency number where someone from the program can be reached after office hours.



Recognize serious violations of policy



“Some violations of conduct may be so serious that a volunteer should be terminated immediately:

- appearing in court or making contacts while under the influence of drugs and/or alcohol;
- offering drugs or alcohol to a child or parent;
- any form of child abuse;
- an intentional violation of a court order, or
- breaking the Iowa Code re: Confidentiality
- felony charges against the Advocate
- being in possession of a firearm while participating in any volunteer role for the CASA Program.

These are all serious violations. It is not the Coach’s responsibility to deal with these issues, but the role does require that if a Coach is made aware of such violations that they contact their Local Coordinator immediately.

If termination becomes necessary, the Coordinator will need to document the reason in a letter to the Advocate. This letter is maintained permanently.” The Coordinator may ask that as the Coach of the Advocate you assist in providing the necessary information.

Adapted from “Volunteer Supervision and Consultation,” National CASA

Coaching for Case Specific Advocacy

The final area within coaching duties connected to *Supporting the Advocate* are related to coaching efforts for case specific advocacy. This includes understanding the Department of Human Services' Case Permanency Plan and assisting the Advocate in deciphering what are the case issues being addressed by the state's reasonable efforts. The court will generally adopt those case plans and thus, the Judge will be monitoring the case goals and Department's expectations to determine if reasonable efforts have been made, and if progress has been demonstrated sufficient to rule on the permanency goal. Therefore, it is important that the Coach also understands this to effectively coach and guide the assigned Advocate in their monthly fact-finding and monitoring efforts. All of those efforts culminate in the Advocate's court report and recommendations to the court. Without adequate case advocacy, the validity of the CASA report is minimized, and the child's safety, well-being, and permanency outcomes may not be influenced fully.



One of the ways the CASA Program can impact child outcomes, and is an important piece of the coaching role, is by everyone involved having some level of case oversight. As we discussed earlier, this skill is first demonstrated by Coaches and Coordinators during *Assigning a Case* duties. It is also necessary when Coaches are monitoring their Advocates monthly efforts to ensure they are meeting their role expectations for monthly contacts. Case oversight is necessary when determining if there are risks being managed on a case, and case oversight becomes necessary to provide guidance to Advocates about additional needed case advocacy efforts they might consider completing in the months ahead.

If you are not clear as a Coach on the case domains, questions to ask of interested parties, specific areas of concern for child well-being that an Advocate could pursue in their fact-finding duties, or what areas of protective and promotive factors are or are not, present in the case, it will be difficult to coach Advocates about what they should do next on their case.



National CASA outlines a very important standard for programs: all volunteers must be trained to work toward cultural competency and humility in the work that they do. Part of coaching then is to be receptive to working with those that are different than yourself, being respectful of those differences, and leaning in toward experiences that

might stretch your personal comfort zone. In order to fully coach an assigned Advocate in a culturally responsive manner, we ask our Coaches to use a humility lens. This lens is necessary whether we are considering any aspect of culture, such as religious differences, sexual orientation, or ethnicity.

Cultural humility is the “ability to maintain an interpersonal stance that is other-oriented (or open to the other) in relation to aspects of cultural identity that are most important to the person.” Cultural humility focuses on self-humility rather than solely achieving a state of knowledge or awareness. Though it is important to expand our foundational knowledge of those that are different than ourselves, our initial goal should always be words, actions and perceptions that demonstrate and accept that others may be different than ourselves and there is value in those differences. The lack of superiority, and having respect are key aspects in demonstrating cultural humility.

For more information you can reference our [Volunteer Glossary](#) for terms and [Websites](#) for other resources for leaning into and initiating new ways to learn more about others.

Hook, J.N. (2013). *Cultural Humility: Measuring openness to culturally diverse clients*. Journal of Counseling Psychology.

We provide a number of resources to our Advocates to assist them in their case advocacy efforts. It is important for you as the Coach to be aware of what the CASA training program offers for resources and continuous learning opportunities for Advocates so you can reinforce the intended learning. An up to date list of our current in-service trainings can be found on our website:

<https://childadvocacy.iowa.gov/casa/current-casa-advocates> . Click on the *Advocate In-Service Trainings* link.

Some helpful training resources specific to understanding and guiding case specific advocacy efforts are:



- ❖ A DHS Family Functioning Domain
- ❖ Sample Line of Questions for CPP Domains
- ❖ Investigating and Gathering Information Toolkit
- ❖ Monitoring a Case
- ❖ Using the Protective Factors as Lens to Monitor Progress Toward Case Closure

For a complete list of resources please go to:

<https://childadvocacy.iowa.gov/forms-and-resources>

Quality CASA Reporting



The Coaches last task within the *Pillar of Supporting the Advocate* (that is also included in the pillar of *Supporting the Program*, during the task of editing a report) is to encourage the Advocate to consider all options for adding value to the CASA Report to the Court. Recognizing that your efforts to coach an Advocate regarding report quality, ultimately elevates the importance of their Report to the Court.

Key points related to quality reporting reviewed from the **Coach's Quick Guide** for Editing Reports:

- Ideas and suggestions should be shared respectfully.
- Remember how it could feel to be told an important piece of their advocacy efforts was unintentionally overlooked.
- The Advocate is the author of this report. You are coaching about, not directing, what information should be included in the Advocate's report. This is especially true when it comes to recommendations.
- We share the **CASA Report Quality Assessment Tool for Volunteers** at the back of this manual as a resource to guide inclusion of potential information in the Advocate's report.

As with all areas of the coaching role, all of these duties are only as effective as our ability to maintain **objectivity allows. We should never lose focus on the fact that the CASA Program and our individual roles' (staff member, Coach, and Advocate) effectiveness hinges upon objectivity.**





To further expand your coaching skills for Supporting the Advocate, we will provide you with one of your required continuous learning opportunities within the first year of your coaching role called *Connections for Retention*. This in-service will provide deeper content and skill-based practice for supporting the Advocate along with the content offered in our training *Coaching in Challenging Situations*.



Pillar of Supporting the Child

The attributes and competencies shared thus far, and skills and duties practiced within the Pillar of *Supporting the Program* and *Supporting the Advocate* concurrently impact the Pillar of *Supporting the Child*.

Communication skills

Throughout this module we have discussed communication competencies as an important feature within each of the coaching pillars. This holds true in the pillar of *Supporting the Child* as well. Being a servant leader includes using emotional intelligence with our good communication skills to be respectful of those that are following us as a leader. Our attitude and demeanor impact our ability to be a true servant leader.

Opportunities for courteous and respectful communication helps everyone, so it is also a feature in the Pillar of *Supporting the Child*. It enables all involved to be more effective in their individual roles to work toward positive change for better child outcomes.



Your Coordinator recognizes that you already bring strong communication competencies to your role within our organization. There may be occasions, however, that as a volunteer in the child welfare system, you experience anger or frustration. At times, you may be tempted to act unkindly. Other times, you may be too busy or preoccupied with your own coaching duties, or your issues in your personal life, to consider the people around you.

Regardless of how you are feeling at a particular moment and for whatever the reason, it's important to treat people politely and respectfully throughout your day. It's not enough to simply do your job as a Coach; you must do it in a way that makes others feel supported and valued during their interactions with you.

Why should you care how others feel? What's in it for you? Well, actually, courteous communication can benefit you greatly!

- It lifts your own mood.
- It allows you to focus on your coaching role and be productive.
- It creates positive relationships with your Advocates and a pleasant volunteering environment in a difficult system.
- It gets you noticed and makes a good impression on those working in the system around you.
- It shows that you can be counted on to handle challenges with maturity and composure.



In addition to a more satisfying experience for you, courteous communication may also help the CASA Program through better team performance, quality advocacy work, and the ability to identify and apply new ideas to our important function as child advocates. Courteous communication trickles down, which means:



- You serve as a role model for your Advocates.
- It increases Advocates loyalty and their retention to the program to continue on as an Advocate or someday become an effective Coach themselves.
- It increases the Advocate's case advocacy and performance.
- Advocates who have had positive experiences with their Coaches will go on to role model positive interactions with the children and families they serve.
- It supports the idea that Advocates who have a positive experience will share that with family and friends who may become CASA Advocates in the future.

When courtesy and emotional intelligence align in supportive relationships, Advocates are better able to maintain their objectivity within their role. This objectivity supports their obligation to advocate for the child's best interests while keeping in focus the legal obligation of Minimum Sufficient Level of Care.

So, ultimately, who benefits most from strong skills and competencies of courteous communication ~ the children and families our CASA Program is in place to serve as "Officers of the Court."

Resiliency

In Module 1 we reviewed the concepts of protective and promotive factors. It is important to remember that the reason to focus on these factors in a case is to strive for recommendations that will build resiliency.

Core Goals / Mission of the CASA Program

Together, our program and the work of every volunteer that comes to serve the program, make the world a better place for the abused and neglected children in Iowa. The culmination of your coaching work, completion of those tasks that support the operation of the program, and the support you provide to the Advocate themselves which produces effective, objective reports, eventually results in the Juvenile Court Judge having valuable additional information to use in determining the best interests of children served by the program and the court. Without you and your efforts as a Coach, we could not reach as many children.

This training has outlined how all the tasks that a Coach completes is directly tied to a pillar of support, and that each task and pillar is intertwined and interwoven to create a tapestry of caring, committed adults working together to improve the lives of children. All of the concepts discussed, and tasks outlined can directly and indirectly be connected to the goal of nurturing the child's environment so that they are more like a dandelion, capable of growing and thriving in an environment that has been less than ideal.



Activity: Watch video and discuss questions.



Being a servant leader, as outlined within the *Supporting the Advocate* Pillar, includes the need for the servant to take care of themselves. By doing so, it helps all involved build upon their own protective factors, and thus their own level of resiliency.



Our Advocates are better equipped to handle the stress of advocating for abused and neglected children when they take good care of themselves. In that same vein, our Coaches are better able to support the Advocates if they take good care of themselves. Much like a

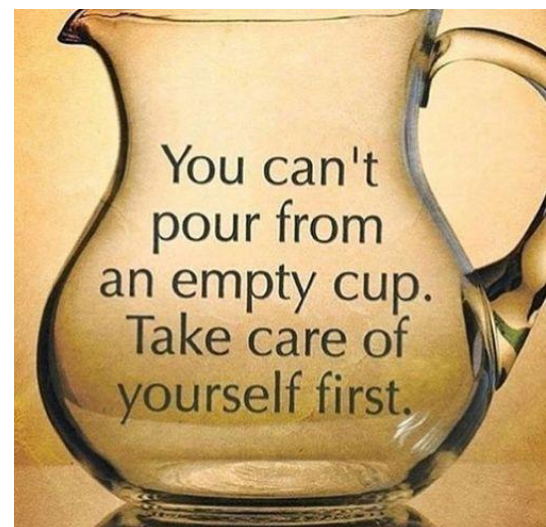
string of dominos, when our program focuses on self-care for our staff, who then role model self-care to our Coaches, who can effectively support our Advocate's personal care and resiliency, then we ultimately support the children we are commissioned to serve.

Coaches Self-Care and Appreciating your Own Coaching Efforts and Successes

Some basics of self-care were shared in Module 1. It is important to outline what those initial ways will be that will help you manage your self-care as a Coach.

Learning from the Resiliency Project:

Core Elements for Resiliency: Five CASA programs participated in a national pilot of an organizational model to build resiliency in child abuse staff and volunteers. The project resulted in many suggestions, including these:



Sense of Hope

Organizations and individuals can recognize staff and their volunteers with thank you notes, retreats and activities that underscore the difference they are making. This helps build a sense of optimism that increases resiliency and decreases turnover.

Laughter

The work is serious, but we don't always have to be. Finding opportunities for laughter and fun in the workplace are simple ways to build strengths in this core element.

Healthy Coping Protocols

Have protocols in place to deal with child deaths or other crises. Have a peer support network in place, such as a CASA to CASA closed Facebook group, that Coaches and Advocates can utilize when they feel despair or overwhelmed about the course of a case.

Personal Perspective and Meaning

Foster reflection and journaling that helps Coaches and Advocates "make meaning" of the work and its alignment with their personal values, moral code, or spirituality.

In Module 1, you were asked to complete a self-assessment on compassion fatigue. This is a beginning step in the process of self-care. First, we need to become aware of our potential for experiencing compassion fatigue due to the work we do as staff and volunteers in the child welfare system. Secondly, we need to self-assess if we are showing signs of concern, and thirdly, reach out to others when it occurs so that they can support our need for healthy self-care. Your Coordinator is invested in you and your health. Please role model for your Advocates good self-care by sharing with your Coordinator when you are experiencing symptoms of compassion fatigue.

Activity/Discussion: Self-Care for Coaches

Part One: Discuss a case that caused you, as an Advocate, personal distress.

- Identify why and how you began to identify deeply with the child, family, or the event.
- Explore how your empathy was activated beyond your capacity, if applicable.
- Note the impact that it had on your wellness.

Part Two: Your self-care plan

- List one mini-escape or diversion that can restore and renew you.
- List one thing that brings you joy.
- Write a list of self-care activities that work for you personally.
- Each person in the group share one activity aloud.



With every Advocate you coach, an important relationship is built. Take the time to note down the growth and successes that came from your supervision of the volunteer Advocate. Appreciate yourself for the effort, integrity and care that you put into the relationship. Don't blame yourself if things didn't go perfectly. Simply do your best, keep growing and encourage others to do the same.

We also provide our Coaches *Self-Care for Coaches* in-service training to maintain our program's commitment to sustain a trauma-informed program that builds resiliency for all.

Sometimes, even when we are practicing good self-care, some Advocates who show signs of compassion fatigue need to be encouraged (sometimes even required) to take a leave of absence from being an Advocate. This being said, we do not want to make them feel rejected or isolated! They need to be given more attention, care and a sense of belonging.

If they want to stay, we can invite them into another volunteer role at the agency, perhaps becoming a Coach. Talk to your Coordinator if you feel one of your assigned Advocates might necessitate having additional wellness and self-care activities or even the need to exit the program for a period of time.

What we know is that self-care and resiliency inside an organization leads to volunteer retention. The healthier the organization is, the more people will want to be a part of it. And then there are more people who will want to stay and continue to support the program's mission in some capacity, such as being a Coach!

Final Questions and Next Steps

Let's review the Coach duties and determine if we covered those items adequately for this stage of your training? Remember we have ongoing learning opportunities to strengthen and enhance your skills during your first year of coaching.

- Maintain confidentiality at all times.
- Communicate with Program Coordinator to schedule time to assist with case assignment for your assigned Advocates.
- Accept case in CAMS to access case file information.
- Be present at case assignment meeting with Program Coordinator and Advocate. May be a participant in the case assignment and case planning process or as an experienced Coach, may lead the case assignment and case planning meeting.
 - Receive initial discovery documents from Coordinator and review with Advocates making note of important documents.
 - Complete an Advocate Case Action Form with Advocates at case assignment.
- Contact newly assigned Advocates within 48 hours of case assignment to support coaching relationship and outline role expectations.
- Maintain minimum bi-weekly (every other week) contact with Advocates who have a case assignment to obtain case updates and address any issues.
 - Remind Advocates of their role and responsibilities including CAMS entries, training hours, assessments, court hearings and report deadlines.
- Utilize CASA Training materials to support Advocate's case efforts and program expectations.
- Provide networking opportunities for team of Advocates.
- Check email (every other day) to timely respond to Advocates and their case needs.
- Check CAMS (every other day) to timely review case notes and monthly updates.
- Check EDMS account regularly for court-related case updates.

- Document your own coach-related activities within CAMS.
- Be available to attend court hearings, FCRB meetings, FTDM meetings, DHS staffings with Advocates, or on their behalf, and document actions taken in CAMS.
- Review and edit Advocate's draft court reports, approve completed reports and notify Program Coordinator for report finalization, filing and distribution.
- Provide Advocates with supportive case oversight via understanding case issues and sharing available community resources.
- Communicate a minimum of once per month with Program Coordinator to discuss Advocates supervised, case developments and other issues or concerns that have arisen.
- Consult with Program Coordinator regarding assigned Advocates' performance concerns and provide input for annual mutual performance review.
- Schedule coverage for your unavailability. Timely contact Program Coordinator regarding coverage issues.
- If assigned to own active case as an Advocate, continue ongoing case advocacy efforts and case responsibilities.



Activity: Are We Ready

After completing this session today, are you feeling more prepared?

Listen as the facilitator goes through the concerns and fears listed on sticky notes at the beginning of the training.

- Have your concerns been addressed?
- Are you less fearful now than you were at the beginning of this training?

If you have more questions or concerns, please talk with your Facilitator or your Coordinator. They can provide you with more information.

As a CASA Coach I am entrusted by the program to serve and support the Advocates assigned to me. I understand that my role is that of a servant leader and therefore,

I COMMIT to adopt, in my CASA Coach role, the mission of strengthening efforts to ensure that each child we serve is living in a safe, permanent and nurturing home where they can thrive.

I COMMIT to actively listen and support assigned Advocates to the best of my ability;

I COMMIT to use good coaching techniques whenever possible and limit direct supervision to a minimum;

I COMMIT to support Advocates in court hearings and meetings for the child as needed and assure the Advocate that he/she can stand on their own;

I COMMIT to maintain contact with assigned Advocates at least twice per month;

I COMMIT to maintain a minimum of two contacts with my Program Coordinator per month, and will ensure the Coordinator receives court reports timely;

I COMMIT to recommend two Advocates to be CASA Coaches every twelve months as long as I continue on with the program, and to refer anyone I believe would be a good Advocate to my Local Coordinator;

I COMMIT to complete 12 hours of training annually, including training on confidentiality and information security, to develop my professional leadership knowledge to better serve the Advocates; and

I COMMIT to serve Advocates to the best of my ability knowing that retention is the key to serving every child and youth in need.



CASA Coach Signature



Thank you for giving us your valuable time to learn more about becoming a CASA Coach. If you're ready, we are ready to start assigning Advocates to you. Your Coordinator will be in contact with you shortly to begin these assignments.

You will receive an email notice to complete your evaluation in CAMS. The link to the evaluation will be found on your volunteer CAMS dashboard.

Thank you for all you do for the CASA Program!